

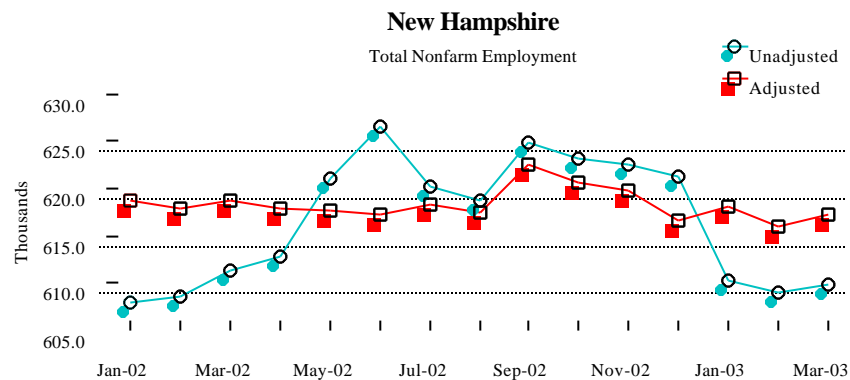
MONTHLY ANALYSIS OF INDUSTRY EMPLOYMENT DATA  
New Hampshire, March 2003  
B G McKay

**NOTE:** The Bureau of Labor Statistics (BLS) says, 'For purposes of analysis, the BLS has further aggregated NAICS sectors into groupings called "Supersectors". The Current Employment Statistics (CES) program will publish data for these supersectors as well as sectors and detailed industries. Also, the aggregations to Goods-Producing and Service-Providing industries will be retained. The CES program will continue to classify all publicly-owned establishments in government.'

For more information on the CES conversion to NAICS, see our web site, <http://www.nhes.state.nh.us/elmi/pdfzip/econanalsy/articles/2002/NAICS.pdf> or the BLS web site, <http://www.bls.gov/sae/saesuper.htm>

**Seasonally Adjusted:** Total nonfarm employment increased by 1,400 jobs according to the seasonally adjusted estimates for March. Of the supersectors that met the seasonal adjustment criteria, leisure and hospitality (NAICS supersector 70) covered 500 of the 1,400 additional jobs.

Breaking away from its downward trend of late, manufacturing (NAICS supersector 30) contributed 300 jobs to March's total. The only other supersector to show increased employment levels was trade, transportation, and utilities (NAICS supersector 40), which added 100 jobs to its roster.



On the downside of March's seasonally adjusted estimates, construction (NAICS supersector 20) and government (NAICS supersector 90) each cutback 200-jobs.

**Unadjusted:** In unadjusted estimates for March, total nonfarm employment grew by a mere 800 jobs. Leisure and hospitality (NAICS supersector 70) and manufacturing (NAICS supersector 30) captured the lion's share of that growth as each added 300 jobs. Employment in professional and business services (NAICS supersector 60) added 200 jobs to the mix, while the work force in natural resources and mining (NAICS supersector 10) and government (NAICS supersector 90) increased by 100 jobs each.

March saw two supersectors shrink their staffs by 100 jobs. Those supersectors were trade, transportation, and utilities (NAICS supersector 40) and education and health service (NAICS supersector 65).

Construction (NAICS supersector 20), information (NAICS supersector 50), financial activities (NAICS supersector 60), and other services (NAICS supersector 80) occupied a middle ground by not altering employment totals during March.

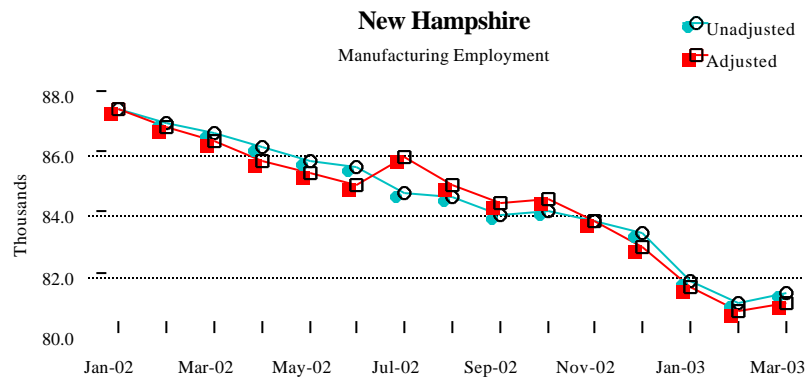
## NATURAL RESOURCES AND MINING

Shifts in employment totals are rare in the natural resources and mining supersector. Mining over the years has been a paragon of stability, but from time-to-time, we see minor changes in mining's employment level. In March, operators of construction sand and gravel (NAICS industry group 212321) expanded their ranks. This was the major contributor to the 100-job increase in this supersector.

## MANUFACTURING

For the first time in four months, total employment in the manufacturing supersector (NAICS supersector 30) has not declined. Manufacturing employment grew by 300 jobs overall in March estimates based on a 400-job increase in the non-durable goods manufacturing sector. A 100-job loss in durable goods manufacturing dampened the good news.

The two published NAICS subsectors in the non-durable goods manufacturing division showed no change in their employment levels from the February total.



In durable goods manufacturing, employment in computer and electronic product manufacturing (NAICS subsector 334) grew by 100 jobs, but semiconductor and other electronic component manufacturing (NAICS industry group 3344) dropped 100 workers from the roles.

Transportation equipment manufacturing (NAICS subsector 336) reduced its ranks by 100 jobs. All other subsectors in durable goods manufacturing maintained job totals at the previous month's level.

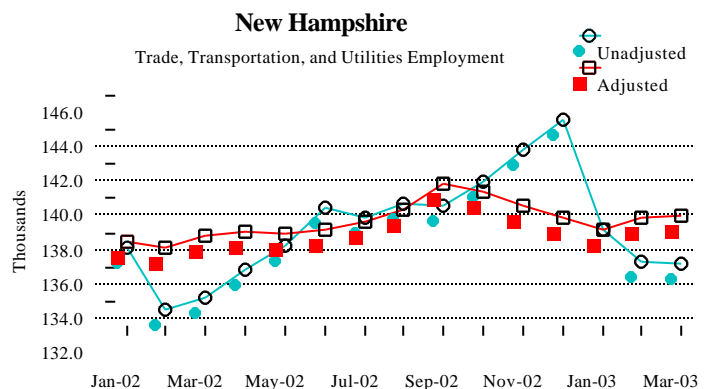
## TRADE, TRANSPORTATION, AND UTILITIES

The trade, transportation, and utilities supersector (NAICS supersector 40) experienced a minor downward shift in total jobs for March. The estimates showed a decline of 100 jobs.

Wholesale trade (NAICS sector 42) dropped 200 jobs in March. Merchant wholesalers, durable goods (NAICS subsector 423) covered 100 of the 200 lost jobs.

The other published subsector, wholesale electronic markets and agents and brokers (NAICS subsector 425) showed no change in employment totals for the month.

For most retailers, the month of March represented a period of relative calm. Retail trade (NAICS sector 44-45) enjoyed a minor 100-job expansion for the month. On the inside of retail trade, estimates showed that the combination of clothing and clothing accessories stores (NAICS subsector 448) and general merchandise stores (NAICS subsector 452) brought 500 additional workers on board during the month. Department stores (NAICS industry group 4521) trimmed their staffs by 200 jobs.



All other employment in retail trade functions was sustained at the February level.

March job totals for transportation and warehousing (NAICS sector 48-49) and utilities (NAICS sector 22) remained unchanged.

## PROFESSIONAL AND BUSINESS SERVICES

March's sample indicated that firms engaged in the practice of accountancy (NAICS industry group 5412) played a major part in the 200-job increase in supersector 60, professional and business services. This 200-job increase could also be found in NAICS sector 54, professional, scientific, and technical services.

The only other published component of this supersector to cause movement in the employment trend line was employment services (NAICS industry group 5613). The level fell by 200 jobs.

## EDUCATION AND HEALTH SERVICES

Supersector 65, education and health services adjusted its employment total downward by 100 jobs in March's unadjusted estimates. Educational services' (NAICS sector 61) employment fell by 200 jobs, while health care and social services (NAICS sector 62) expanded its roster by a 100 jobs.

The 200-job drop in educational services was distributed over all functions in the sector except colleges, universities, and professional schools (NAICS industry group 6113). Employment in this industry group remained at February's totals.

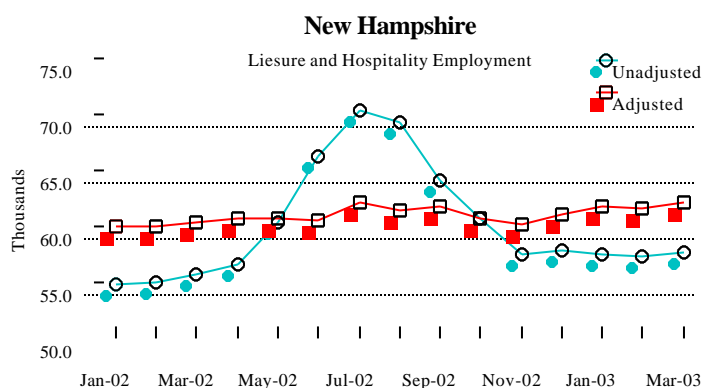
Hospitals (NAICS subsector 622) accounted for the 100-job growth in the health care sector.

## LEISURE AND HOSPITALITY

Employment in leisure and hospitality (NAICS supersector 70) rebounded from the minor setback in February's preliminary estimates with a 300-job increase in March. This 300-job increase was arrived at when accommodation and food services (NAICS sector 72) added 400 jobs, and arts, entertainment, and recreation (NAICS sector 71) shrank by 100 jobs.

Inside NAICS sector 71, amusement, gambling, and recreation industries (NAICS subsector 713) employment fell by 300 jobs in March. The sample suggests that NAICS industry group 7139, other amusement and recreation industries, was the principal mover in this reduction.

The 400-job increase in accommodation and food service and drinking places (NAICS sector 72) could be found in food services (NAICS subsector 722), as employment in accommodation (NAICS subsector 721) remained unchanged. Limited-service eating places (NAICS industry group 7222) accounted for 300 of the 400 jobs gained in food service. Full-service restaurants (NAICS industry group 7221) kept their staffing levels at those established in February.



## GOVERNMENT

Government (NAICS supersector 90) employment expanded by 100 jobs during March. Many communities in New Hampshire held town meetings in March. The 200-job increase in estimated employment for local government reflected that event. Across the state, the non-educational function of local government grew by 500 jobs, while educational service employment declined by 200.

Preliminary March estimates for state government showed no change in total employment for that echelon.

The federal government in New Hampshire fell by 100 jobs, as the postal service continued to pare down its staff.

